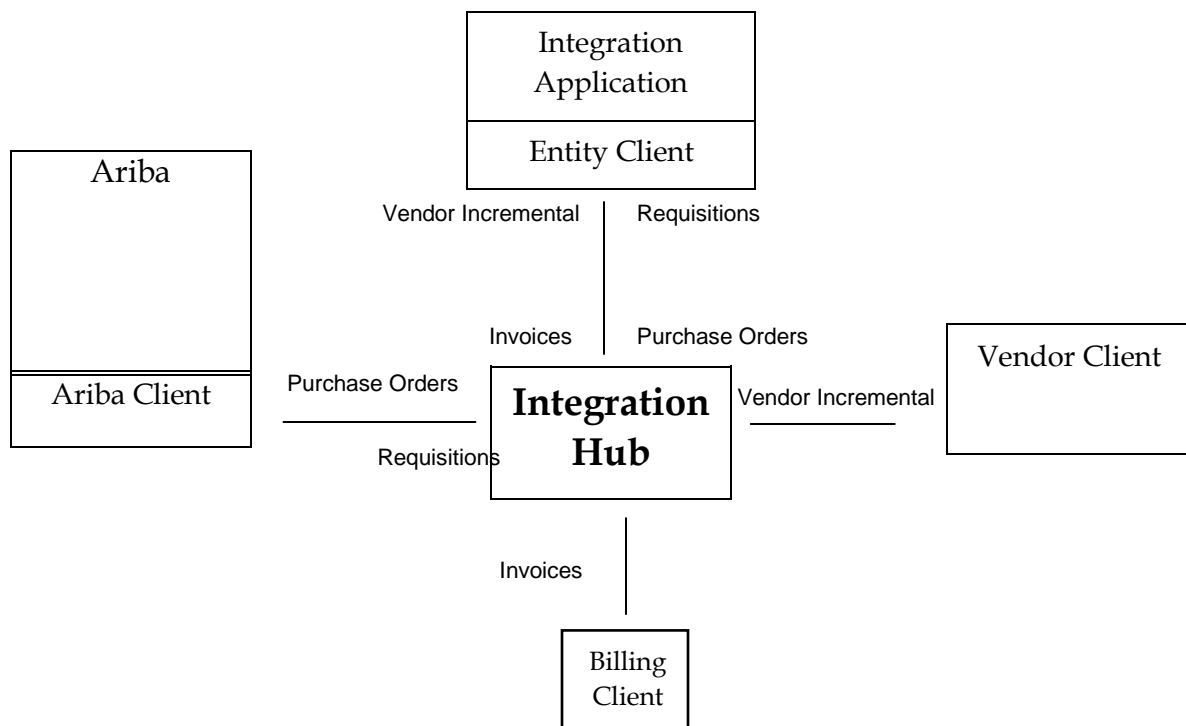## I. Entity Client Overview

The Entity Client is a component of a larger system that integrates the North Carolina EProcurement Service with an Entity's financial system. The Entity Client is a java application that runs as a service on a Windows machine at each Community College Entity. The Entity Client passes requisitions, purchase orders, invoices, and vendors between E-Procurement and the Entity's financial system.

The following diagram describes the high-level architecture:

The Entity Client writes requisition and vendor gXml files to the native file system directory's Requisition/Inbox and the Vendor/Inbox respectively. The Entity Financial System reads the files from these inboxes and deletes each file when processing is complete. If the Entity Financial System cannot process a particular file, it may move the file to the corresponding error directory. The Entity Integration Client does not read or write to the Requisition/Error or the Vendor/Error directories.

The Entity Financial System writes messages to the Order/Outbox and the Invoice/Outbox on the native file system. The Entity Client checks these directories once a minute for files. When a file appears, the Entity Integration Client sends the contents to the Integration Hub and deletes the file. If the file does not validate to the gXml standard, the file is moved to the corresponding errorbox.

II. Installing the Entity Client

The following instructions outline the steps that need to be taken to in order to install the Entity Client. The steps will cover the following:

- Verifying the power settings on the PC
- Checking the LAN settings on the PC
- Installing the Entity Client using the CD
- Starting the Entity Client service
- Stopping the Entity Client service
- Switching from a QA installation of the Entity Client to a production installation
- Requesting the vendor baseline

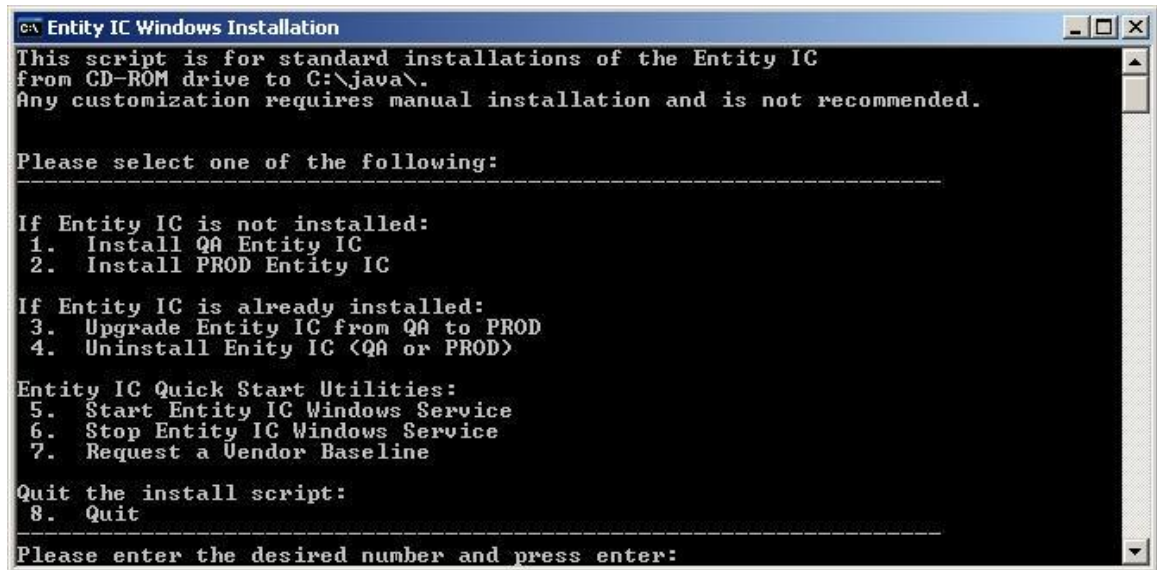Before installing the Entity Client, check the power settings on the computer:

1. Navigate to the desktop of the computer.
2. Right-click on the desktop and select "Properties."
3. Click on the tab labeled "Screen Saver."
4. At the bottom of the Screen Saver tab, click on the "Power" button.
5. Make sure the "System Standby" is set to "Never." If the System Standby is set to anything other than "Never" select it from the drop down box, and click "Apply."

Also check the LAN settings on the computer:

1. Click on the "Start" menu and highlight "Settings" and click on "Control Panel"
2. Double-click on "Network Connections"
3. Alternate-click on "Local Area Connection" and select "Properties"
4. Make sure that both "Client for Microsoft Networks" and "File and Printer Sharing for Microsoft Networks" options are checked
5. Click "OK"

Installing the Entity Client using the CD:

1. Place the installation CD into the CD-ROM drive.
2. Using Windows Explorer, run install.bat. To do this, open a Windows Explorer window and navigate to the CD-ROM drive (usually D: drive). After opening the CD-ROM drive, double click on the "install.bat" file. After you double click on the file, the window below should appear:

3. Select the Install for destination environment. Select 1 for a QA install, or 2 for a production install. In most cases, you will install the Entity Client in QA, and then update the installation for production (described later in this document). After making the selection, press enter. The installation script will attempt to install the EntityIC, initialize the client and register the program as a Windows Service. When the installation is complete, the main menu will appear.

Once the installation is complete, you will need to start the Entity Client service.

1. Alternate-click on My Computer and select "Manage."
2. Double-click on the Services and Applications category on the left-hand side.
3. Double-click on the Services category on the left-hand side.
4. Highlight the EntityIC service located on the right-hand side.
5. Press the Play button at the top of the screen, or alternate-click on the EntityIC Service and select "Start."

When it is time to switch the Entity Client from QA to production, the Entity Client service will need to be stopped.
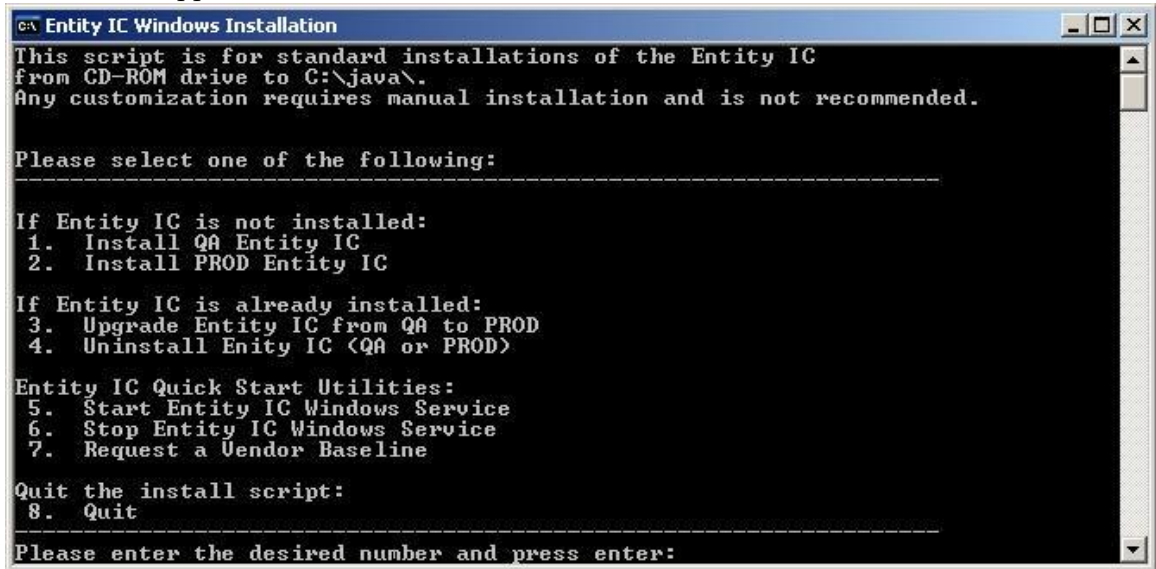
1. Alternate-click on My Computer and select "Manage."
2. Double-click on the Services and Applications category on the left-hand side.
3. Double-click on the Services category on the left-hand side.
4. Highlight the EntityIC service located on the right-hand side.
5. Press the Stop button at the top of the screen, or alternate-click on the EntityIC Service and select "Stop."

Once the service is stopped, the Entity Client will need to be updated from the QA installation to a production installation.

1. Place the Installation CD into the CD-ROM drive.
2. Using Windows Explorer, run install.bat. Open a Windows Explorer window and navigate to the CD-ROM drive (usually D: drive). After opening the CD-ROM drive, double click on the "install.bat" file. After you double click on the file, the window below should appear:


```
cx Entity IC Windows Installation                                    _|□|×|
This script is for standard installations of the Entity IC
from CD-ROM drive to C:\java\.
Any customization requires manual installation and is not recommended.


Please select one of the following:
--------------------------------------------------------------------------

If Entity IC is not installed:
 1.   Install QA Entity IC
 2.   Install PROD Entity IC

If Entity IC is already installed:
 3.   Upgrade Entity IC from QA to PROD
 4.   Uninstall Enity IC (QA or PROD)

Entity IC Quick Start Utilities:
 5.   Start Entity IC Windows Service
 6.   Stop Entity IC Windows Service
 7.   Request a Vendor Baseline

Quit the install script:
 8.   Quit
--------------------------------------------------------------------------
Please enter the desired number and press enter:
```
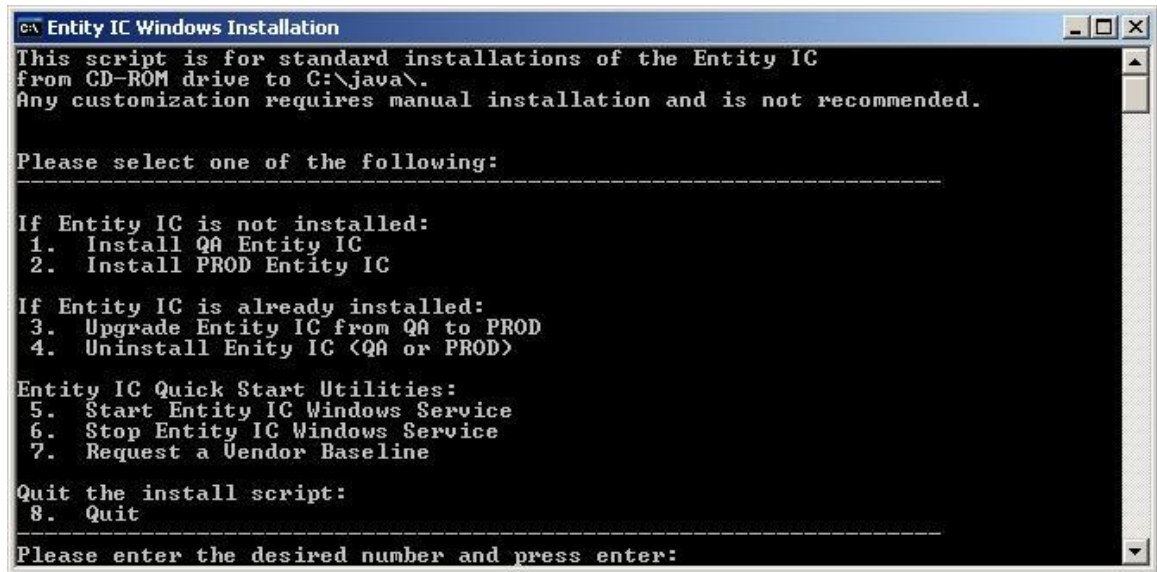
3. Select Option 3 to upgrade the QA Entity Client to the production Entity Client and press Enter. This will take a while. Once the upgrade is complete, the main menu will be displayed.

Once the Entity Client has been upgraded, it will need to be restarted.
1. Alternate-click on My Computer and select "Manage."
2. Double-click on the Services and Applications category on the left-hand side.
3. Double-click on the Services category on the left-hand side.
4. Highlight the EntityIC service located on the right-hand side.
5. Press the Play button at the top of the screen, or alternate-click on the EntityIC Service and select "Start."

A baseline request needs to be issued once the Entity Client has been upgraded to a production installation. This process will move all the vendors so that they are ready to be loaded into the Entity Financial System.

1. Place the Installation CD into CD-ROM drive.
2. Using Windows Explorer, run install.bat. Open a Windows Explorer window and navigate to the CD-ROM drive (usually D: drive). After opening the CD-ROM drive, double click on the "install.bat" file. After you double click on the file, the window below should appear:

3. Select "Request a Vendor Baseline" by selecting option 7 and press enter. The installation CD contains a full vendor baseline.
4. Press y and enter when asked "There is a local baseline on CD. Load this local copy?" This process may take up to 45 minutes.
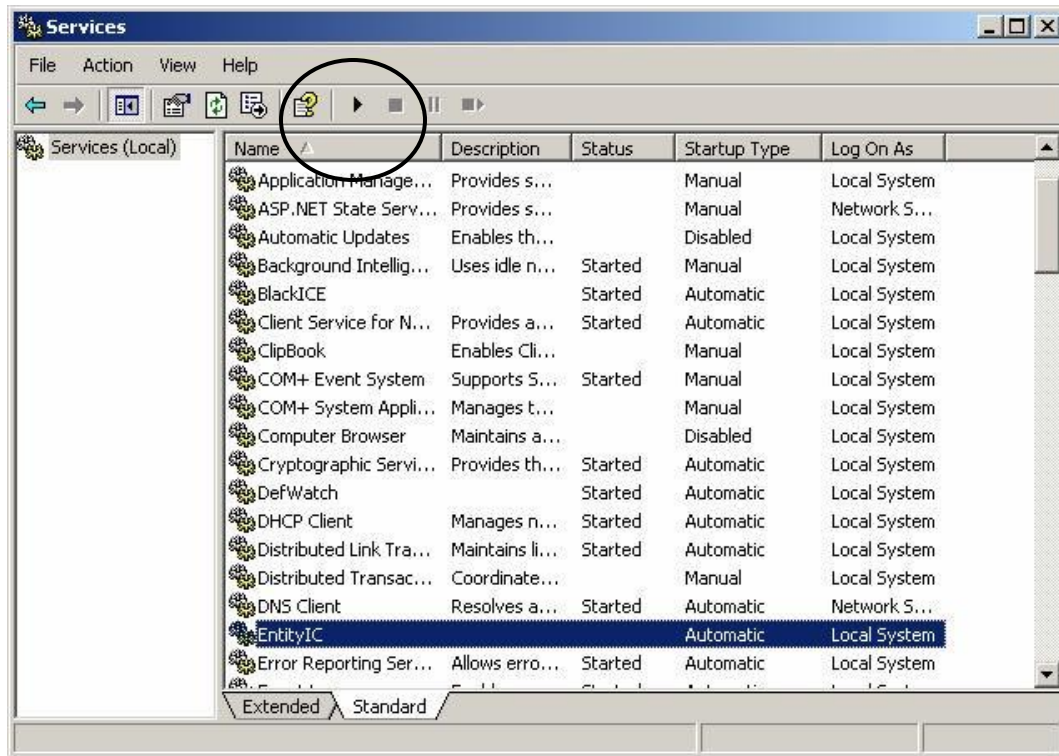
III. Maintaining the Entity Client

Once the Entity Client has been installed, there should be little maintenance by the System Administrator. However, there will be times when the System Administrator will be requested to perform some actions on the Entity Client. The following are the types of requests that the System Administrator may get concerning the Entity Client:

- Starting the Entity Client
- Stopping the Entity Client
- Requesting a partial baseline
- Sending logs to the North Carolina E-Procurement Team

To start the Entity Client:

1. Go to the desktop of the computer.
2. Alternate-click on My Computer and select "Manage."
3. Double-click on the Services and Applications category on the left-hand side.
4. Double-click on the Services category on the left-hand side.
5. Highlight the EntityIC service located on the right-hand side.'
6. Press the play button at the top of the screen.

To stop the Windows Service:
1. Go to the desktop of the computer.
2. Alternate-click on My Computer and select "Manage."
3. Double-click on the Services and Applications category on the left-hand side.
4. Double-click on the Services category on the left-hand side.
5. Highlight the EntityIC service located on the right-hand side.
6. Select the "EntityIC" service from the list of services.
7. Press the "Stop" button to start the service. Allow a few seconds for the Entity Client service to stop completely.

To request a vendor baseline (full or partial) to the production Entity Client:

1. Place the Installation CD into CD-ROM drive.
2. Using Windows Explorer, run install.bat. Open a Windows Explorer window and navigate to the CD-ROM drive (usually D: drive). After opening the CD-ROM drive, double click on the "install.bat" file. After you double click on the file, the window below should appear:
3. Select "Request a Vendor Baseline" by selecting option 7 and press enter. The installation CD contains a full vendor baseline.
4. If a full baseline is needed, press y and enter when asked "There is a local baseline on CD. Load this local copy?" This process may take up to 45 minutes.

5. If a partial baseline is needed, press n and enter the date for the partial baseline. This request will be processed that evening.

To send logs to the E-Procurement team:

1. Go to the desktop of the computer.
2. Alternate-click on My Computer and select "Explore."
3. Navigate to the C:\java\hubclient\logs folder.
4. Inside this folder will be several logs (iclient.log, iclient.log.1, iclient.log.2, etc). The EProcurement team will specify which of these logs will need to be sent.

IV. NC@Your Service Help Desk

If you have questions about the Entity Client please call the NC@Your Service Help Desk at 888211-7440 (7:30 am - 5:00 pm, weekdays).